

Public Opinion Survey Washington State Gambling Commission

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Overview: Key Research Topics

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- **Current gambling activities**
- **Knowledge of gambling regulation**
- **Opinions on a range of current policy issues**

Methodology

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- **Telephone survey**
 - Random digit dial (RDD), cell phones included
- **Conducted in 2005 & 2011**
 - Very few changes: Added 6 questions
- **Results weighted by gender, age & ethnicity**
- **Sampling error: +/- 4.4%**

	2005	2011
Interviews Completed	514	532
Final Dataset	484	457

Washington Residents' Current Gambling Activities

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PARTICIPATION – EVER

PARTICIPATION – IN THE PAST YEAR

AMOUNT SPENT

FREQUENCY

Questions about Participation in Gambling Activities

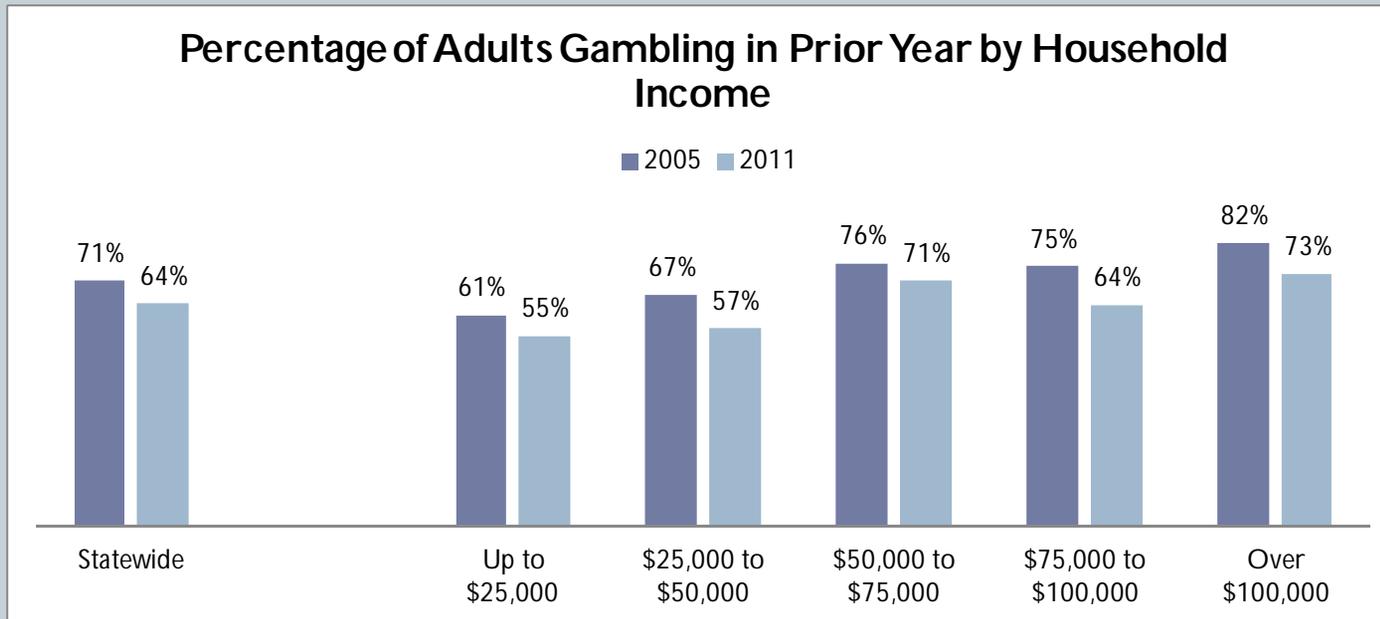
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- Have you ever played or spent money on ... in Washington State?
- Have you played or spent money on ... in the past year?
- Please estimate the amount that you spent on ... in a typical month.
 - (If the respondent only plays a couple of times a year, ask for their best estimate of a yearly amount.)

Participation in Gambling

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- 91% gambled at some point in their lives
- 64% gambled in last 12 months

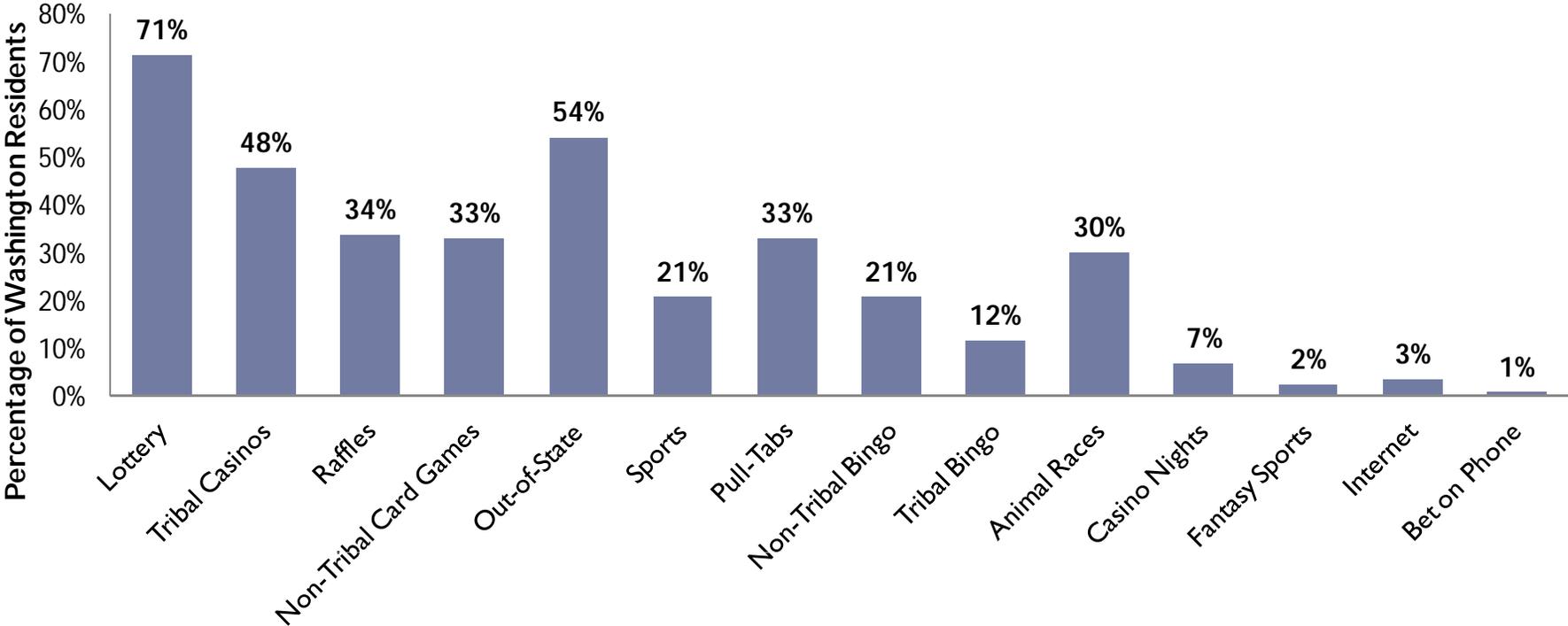


Participation in Gambling Activities: Ever

7

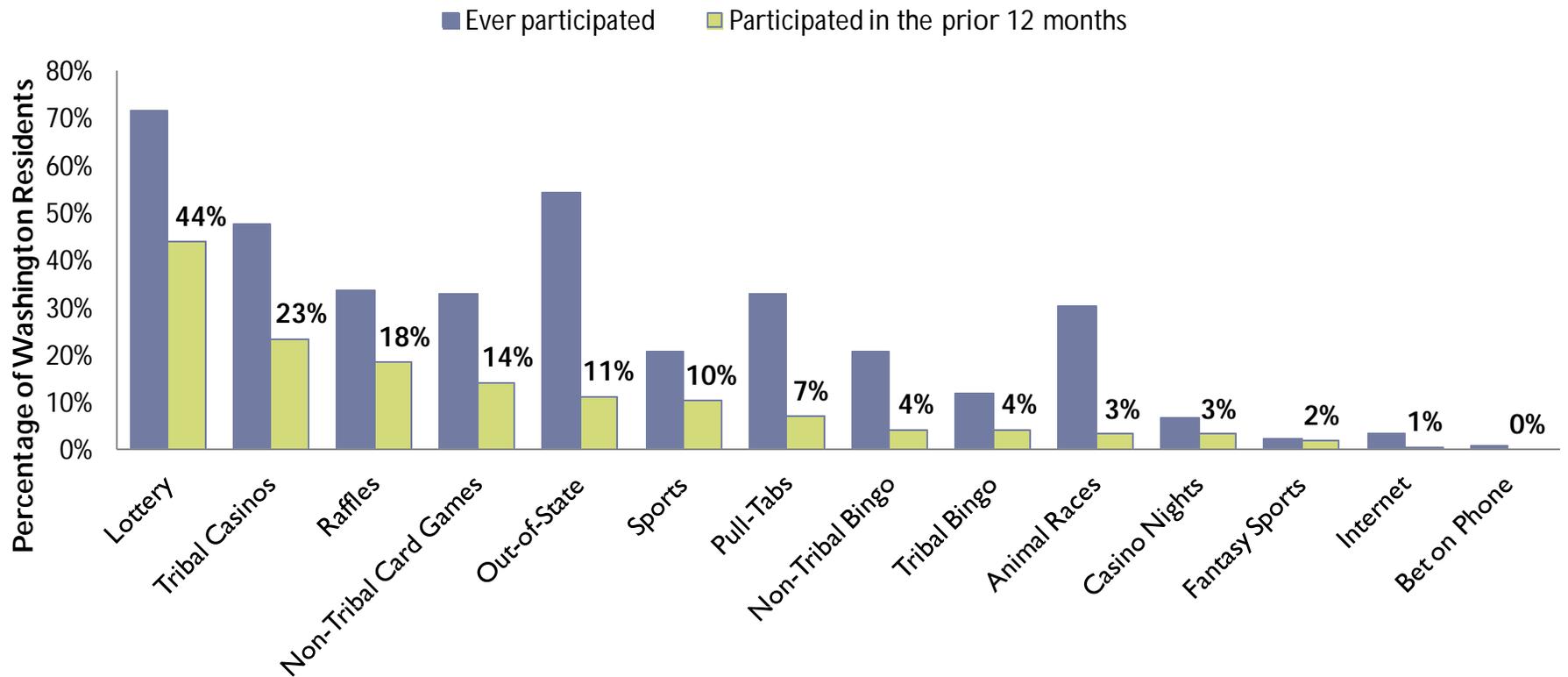
Participation in Gambling Activities: Ever

■ Ever participated



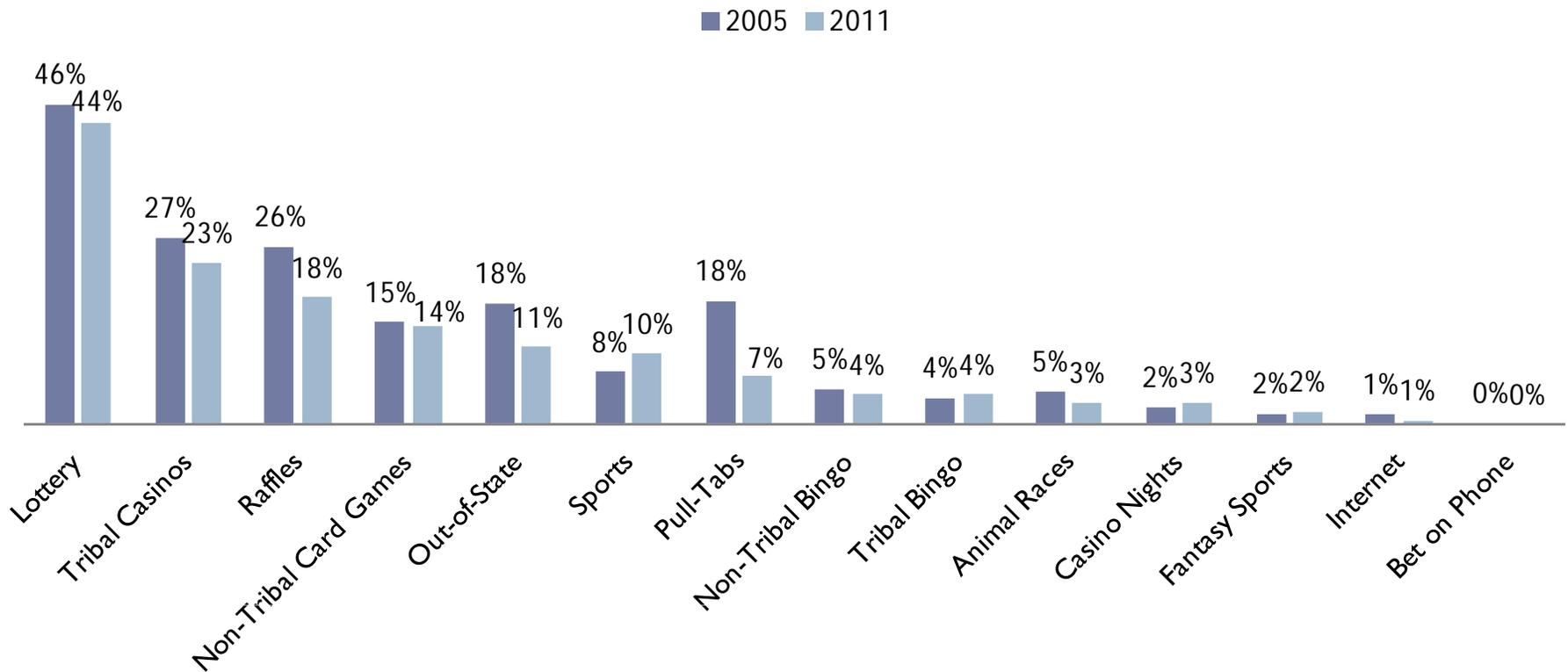
Participation in Gambling Activities: Last Year

Participation in Gambling Activities: Last 12 Months

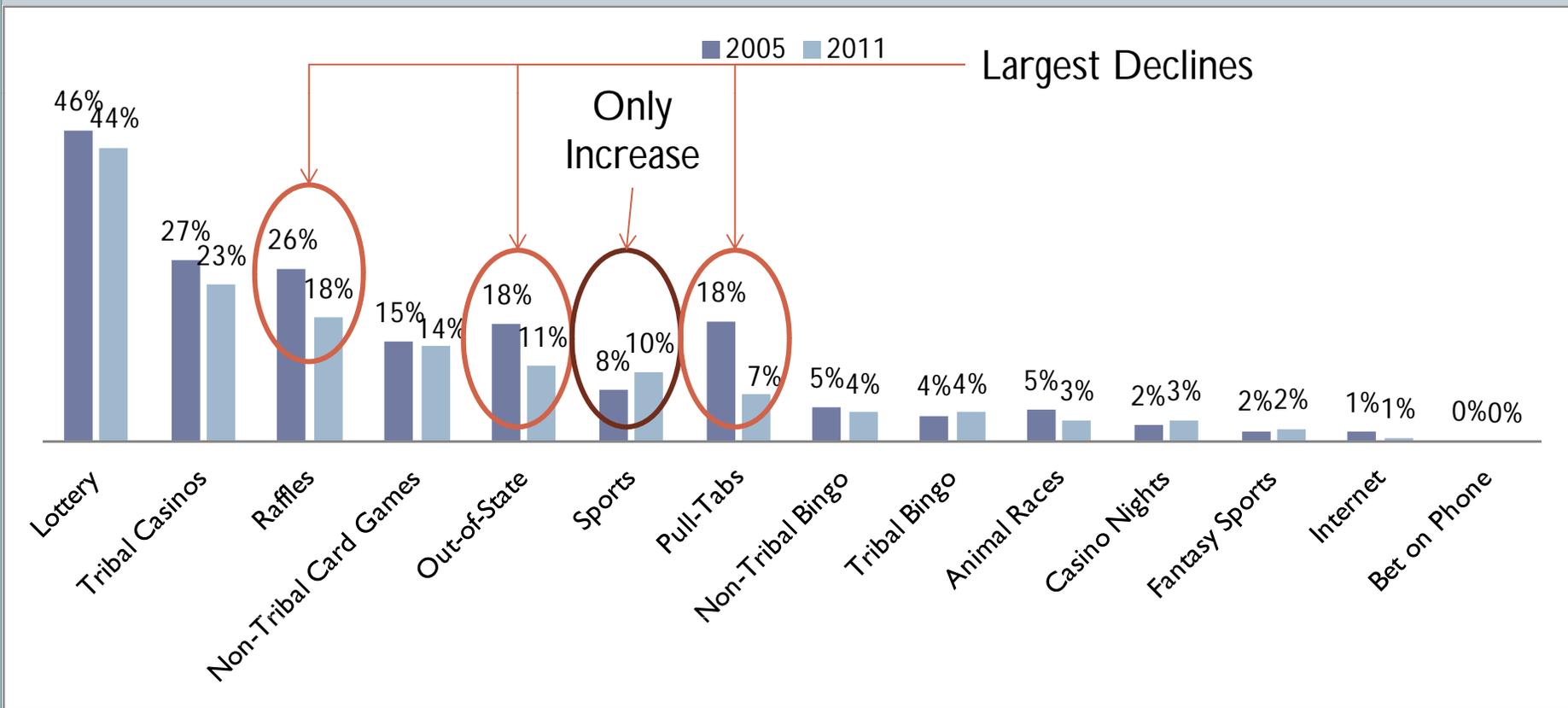


Participation in Gambling Activities in Prior Year: 2005 & 2011

9



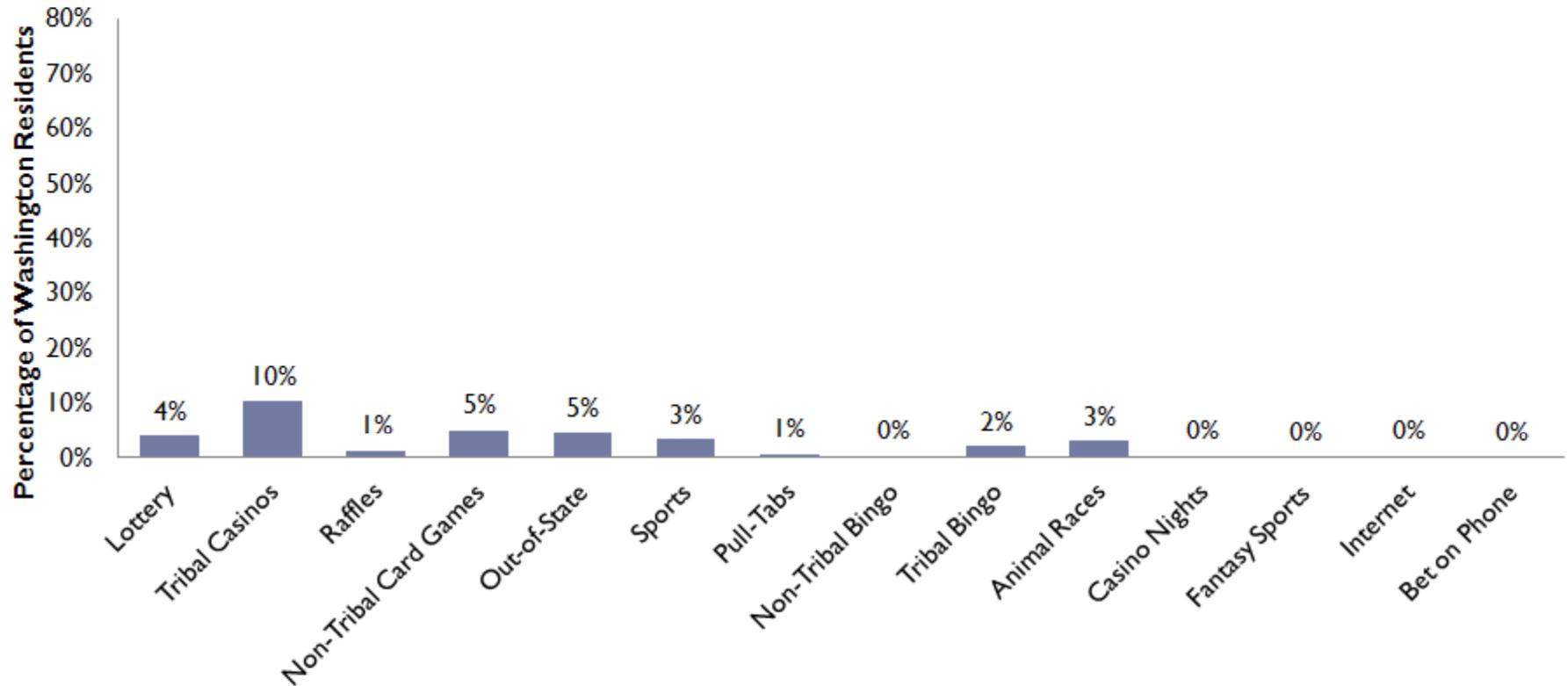
Participation in Gambling Activities in Prior Year: 2005 & 2011



Participation in Gambling Activities: Money Spent (Percentage of Washington Residents)

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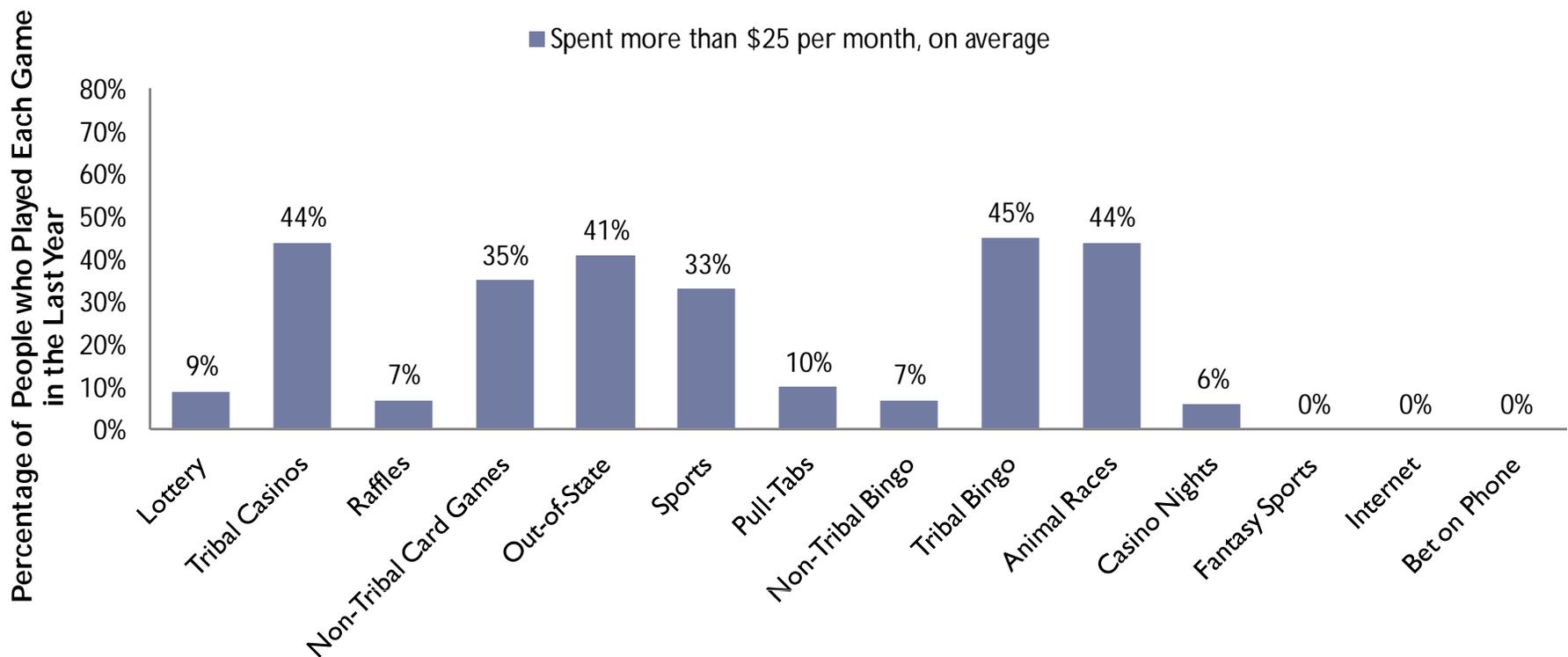
Washington Residents Spending More than \$25 per Month (\$300/yr)



Participation in Gambling Activities: Money Spent (Percentage of Last Year's Players)

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Among People who Played Each Game Last Year, Percentage Spending More than \$25 per Month (\$300/yr)



Lottery

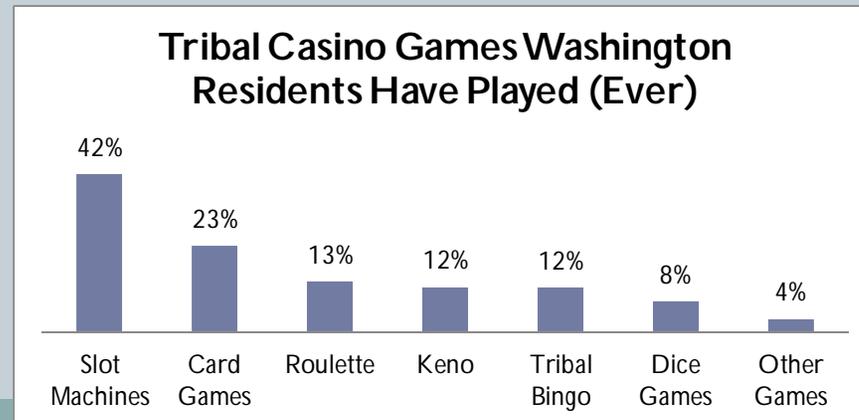
13

- Most popular form of gambling
- 71% ever played
- 44% played last year
 - More men (51%) than women (42%)
- Fairly low expenditure
 - Only 9% of last year's players averaged over \$25/mo
- Frequent players
 - Of last year's players, 22% played weekly

Tribal Casinos

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- 48% ever played
- 23% played last year
- Fairly high expenditure
 - 44% of last year's players spent more than \$25/mo
- Low frequency
 - Only 2% of last year's players played weekly



Raffles

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- **34% ever played**
- **18% played last year**
- **Low expenditure**
 - Only 7% of last year's players spent over \$25/mo
- **Low frequency**
 - Only 2% of last year's players played weekly

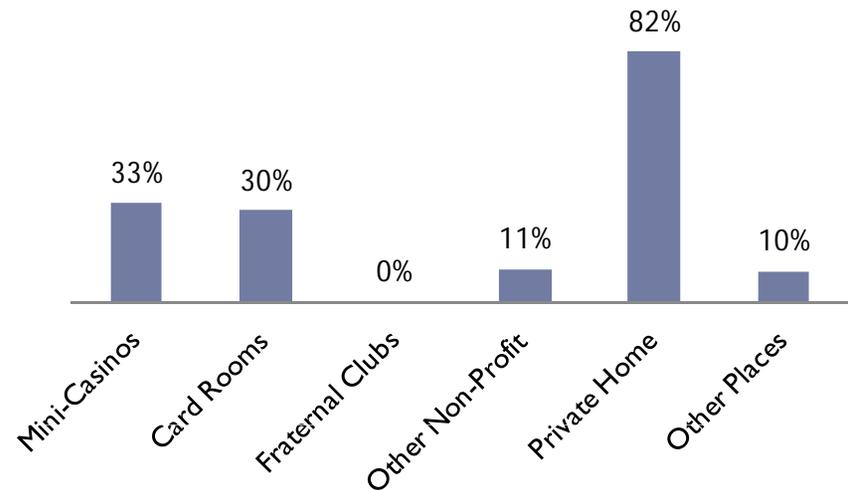
Non-Tribal Card Games

16

- 33% ever played
- 14% played last year
 - More popular among men, minority adults, younger age groups
- Fairly high expenditure
 - 35% of last year's players averaged over \$25/mo
- Fairly high frequency
 - 17% of last year's players played weekly

- 90% started under age 26, with 65% under age 18
- Most play in private homes

Where Non-Tribal Card Games Are Played



Knowledge about Gambling Regulation

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**IS GAMBLING REGULATED?
AND
WHO REGULATES IT?**

Survey Questions

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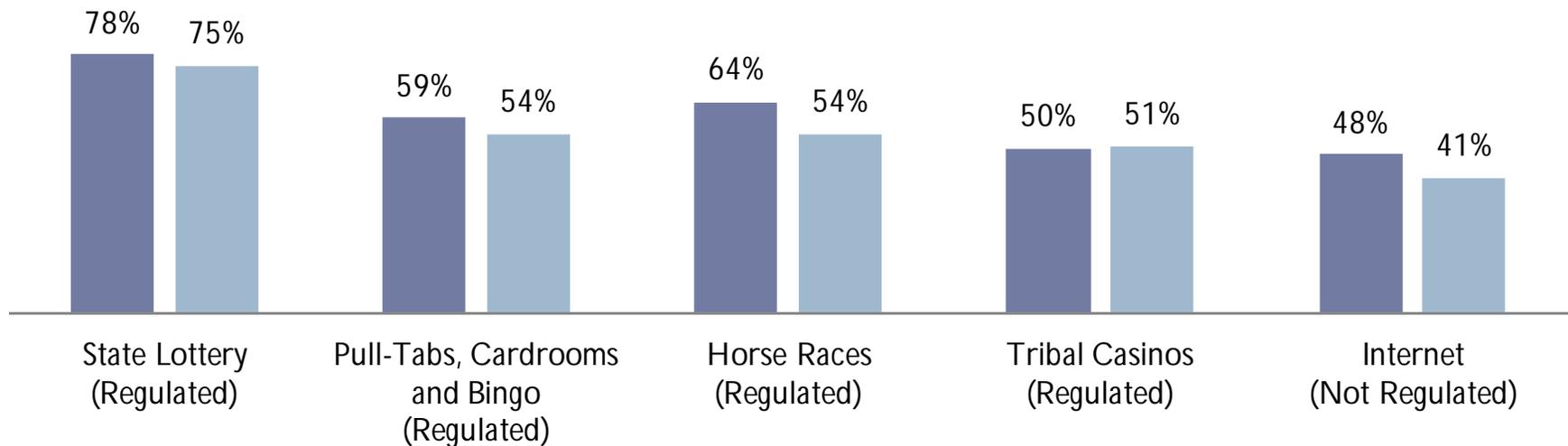
- “To the best of your knowledge, is regulated?”
- If yes: “Who regulates it?”
- These questions asked about 5 types of gambling
 - Lottery
 - Tribal casinos
 - Pull-tabs and other non-tribal gaming
 - Internet gambling
 - Gambling on horse races

To the best of your knowledge, is ... regulated?

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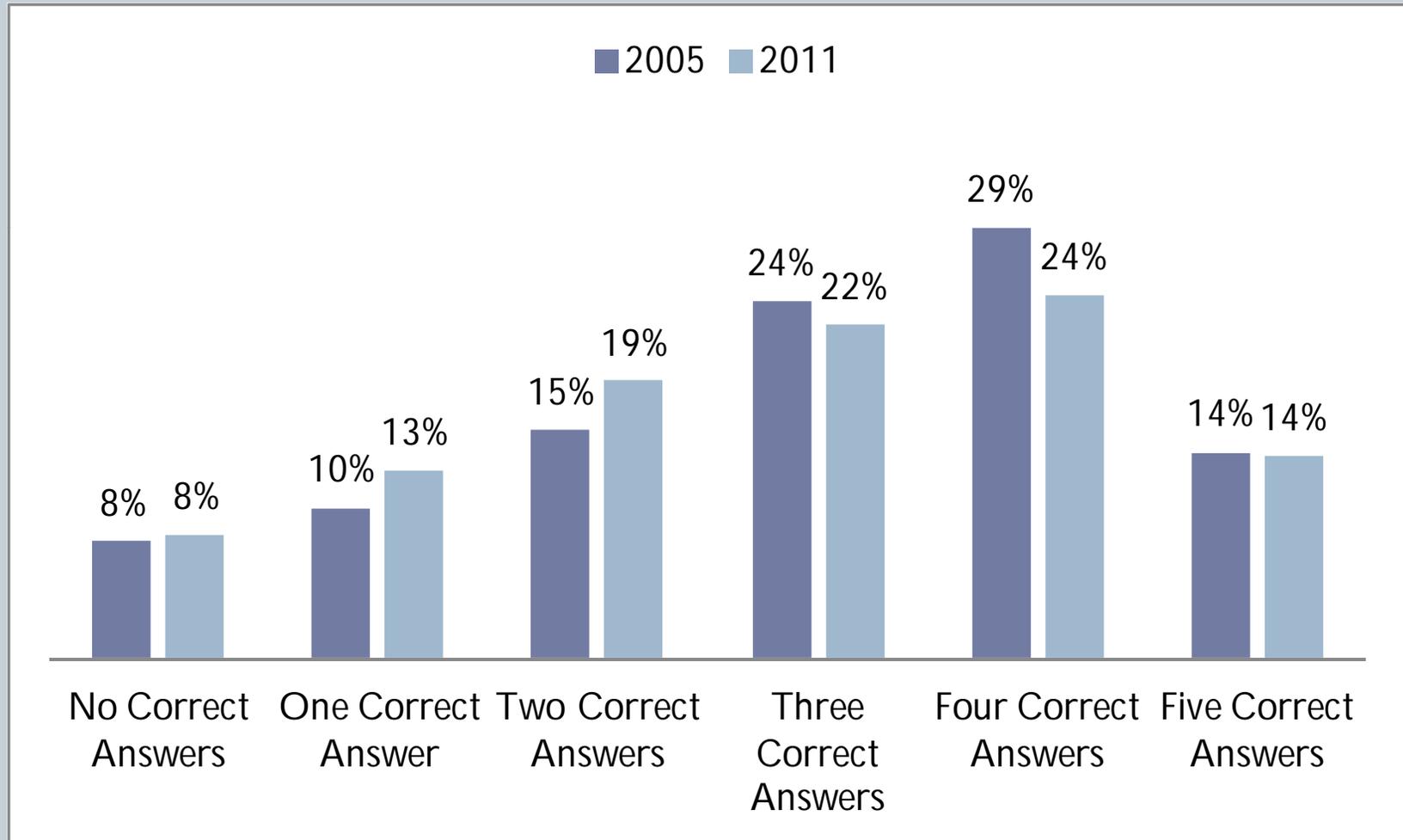
Is Each Activity Regulated? Percentage Answering Correctly

■ 2005 ■ 2011



Number of Correct Answers

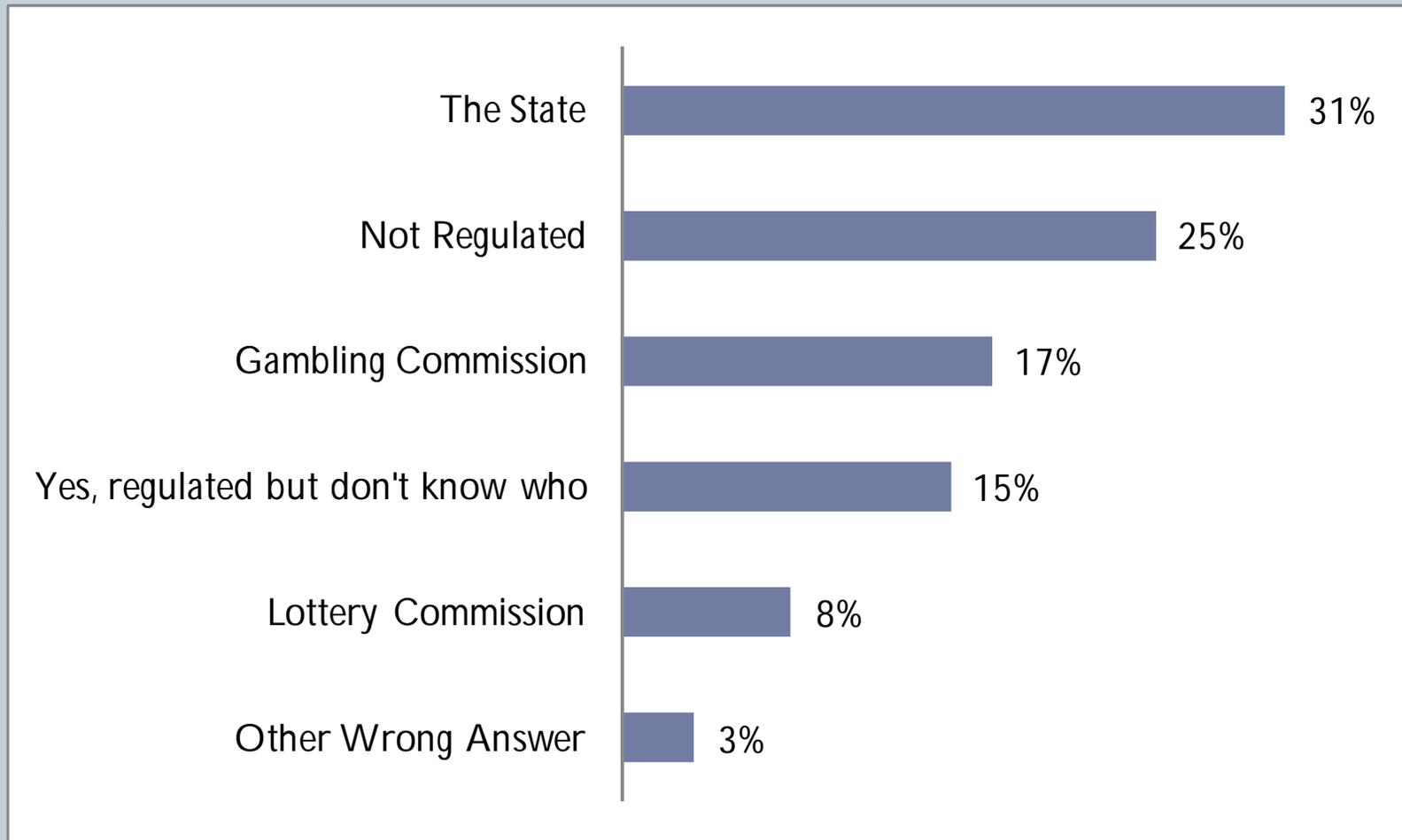
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Who Regulates the Lottery?

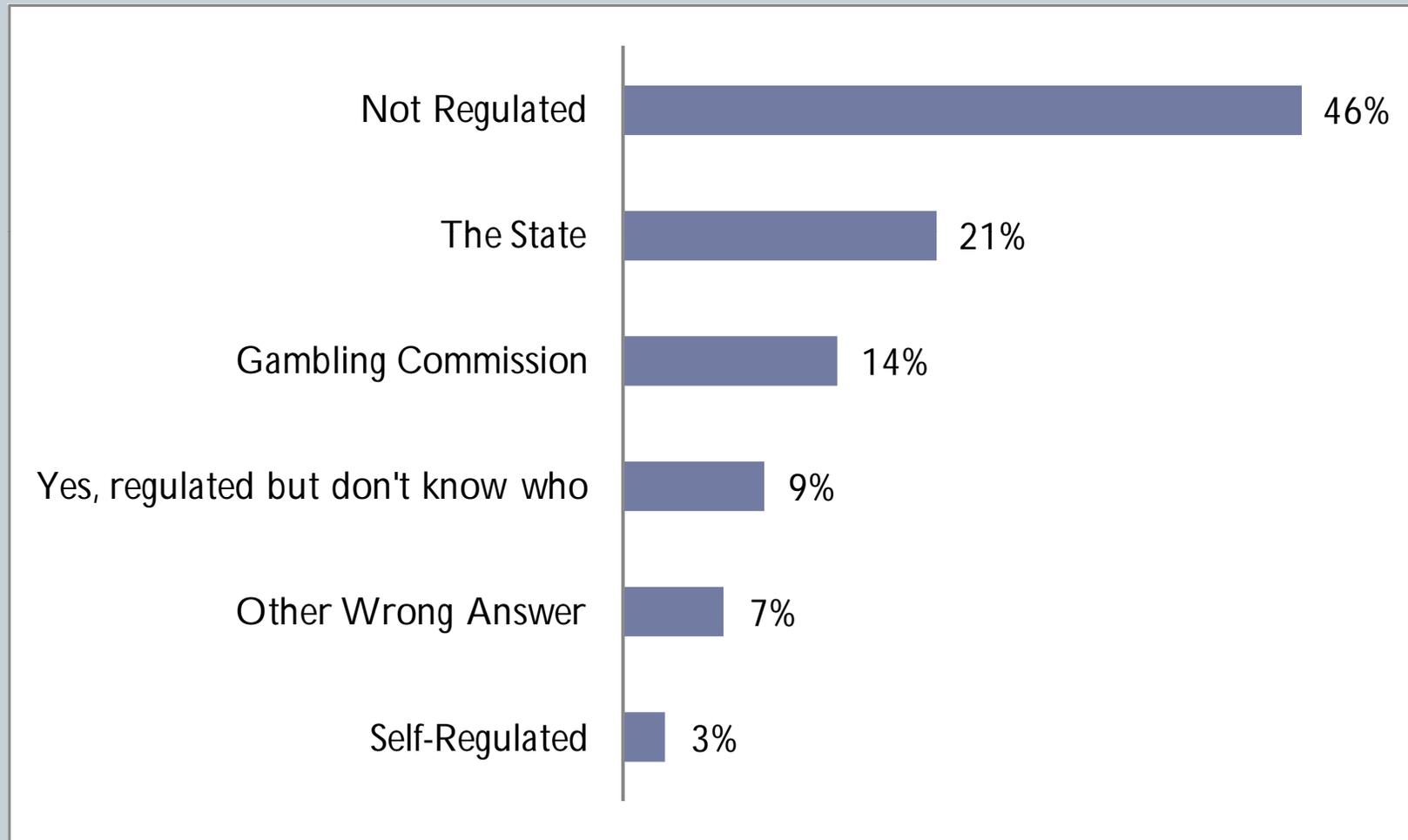
(Correct Answer: The Lottery Commission)

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Who Regulates Pull-Tabs and Other Non-Tribal Gaming? (Correct Answer: The Gambling Commission)

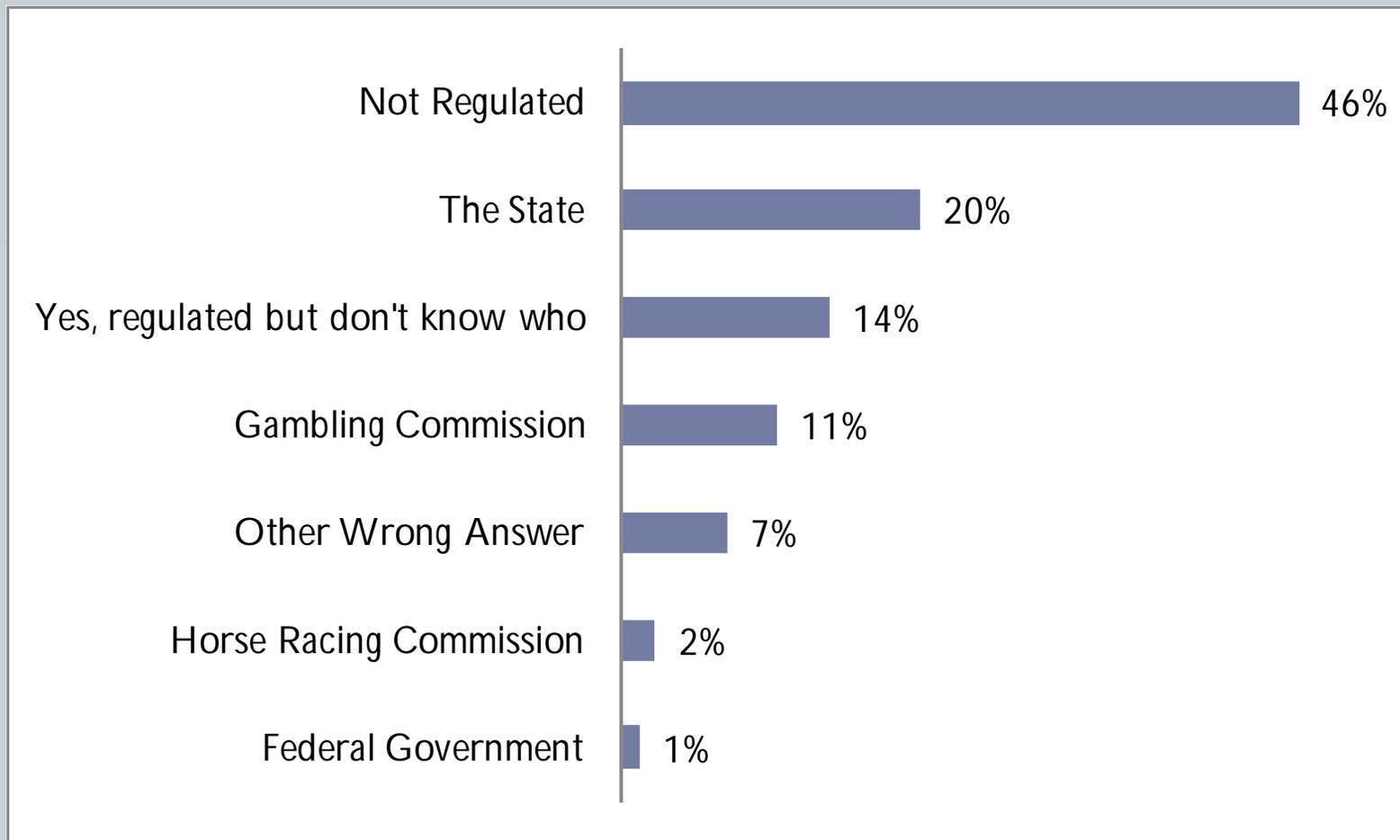
22



Who Regulates Horse Racing?

(Correct Answer: The Horse Racing Commission)

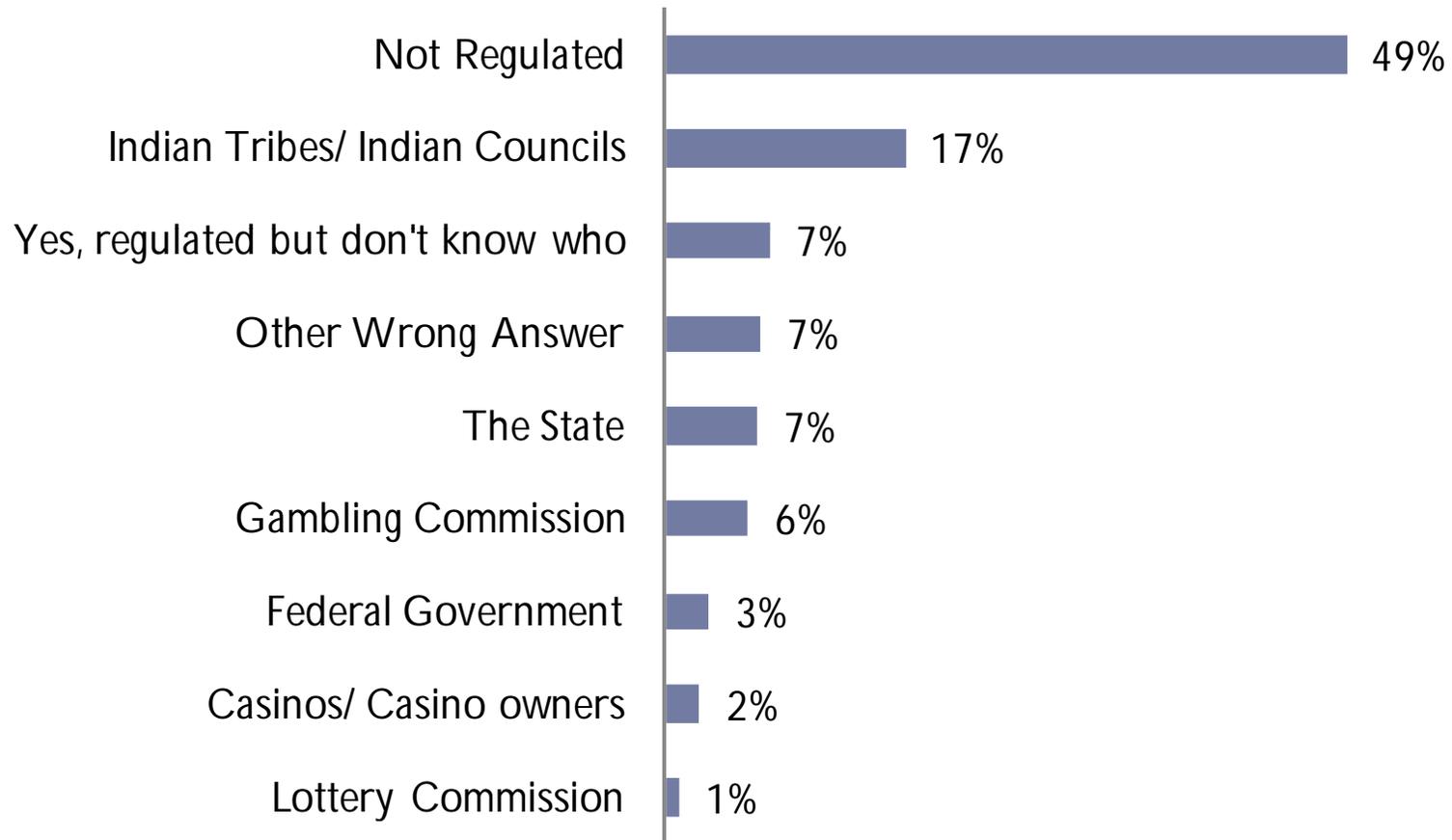
23



Who Regulates Tribal Casinos?

(Correct Answer: The Gambling Commission, the Tribes, and the Federal Government)

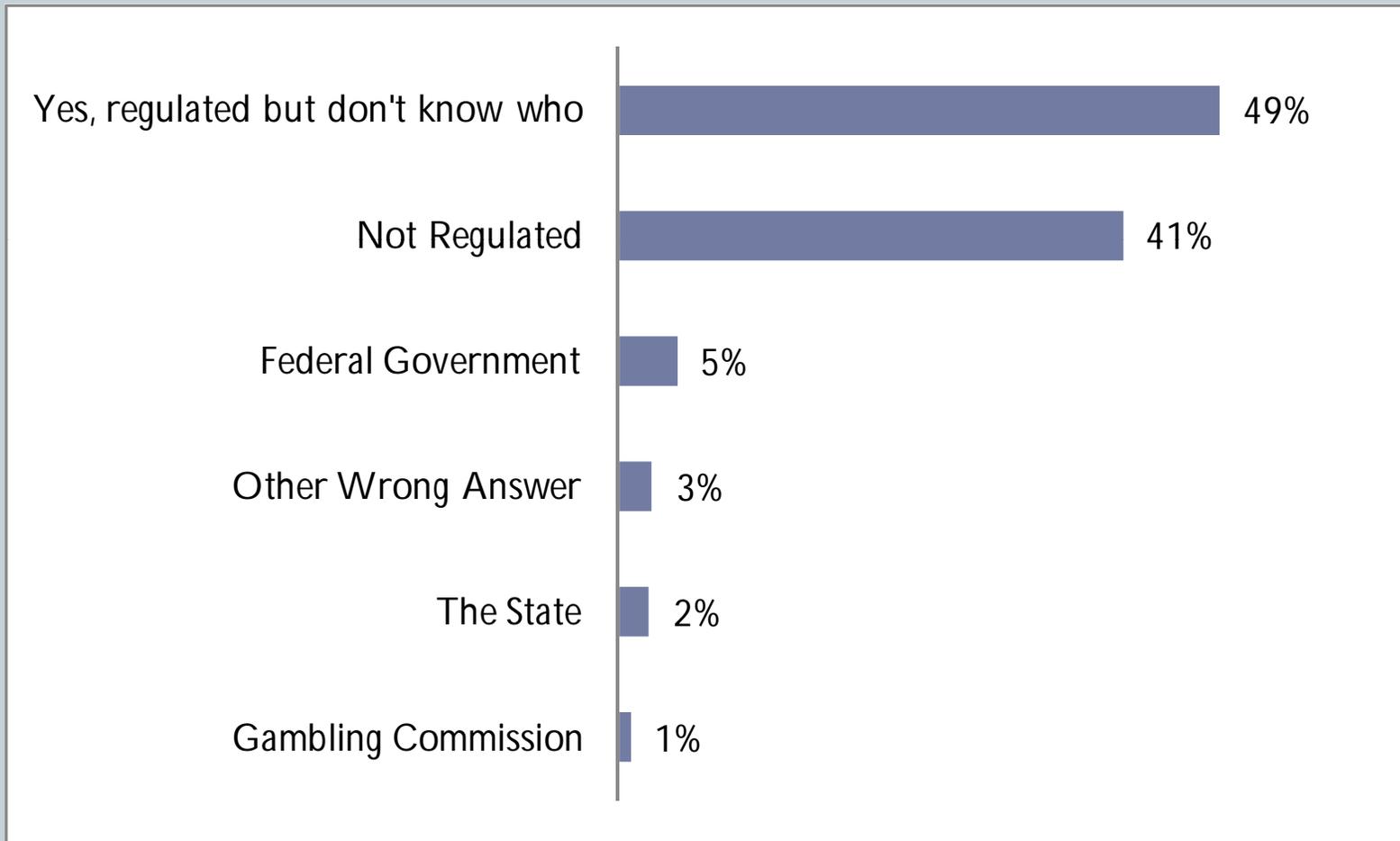
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Who Regulates Internet Gambling?

(Correct Answer: It is not currently regulated)

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Opinions on Gambling Policy Issues

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GAMBLING ACCESS & LAWS

HONESTY & FAIRNESS OF GAMBLING IN WASHINGTON

CONCERNS ABOUT GAMBLING ISSUES

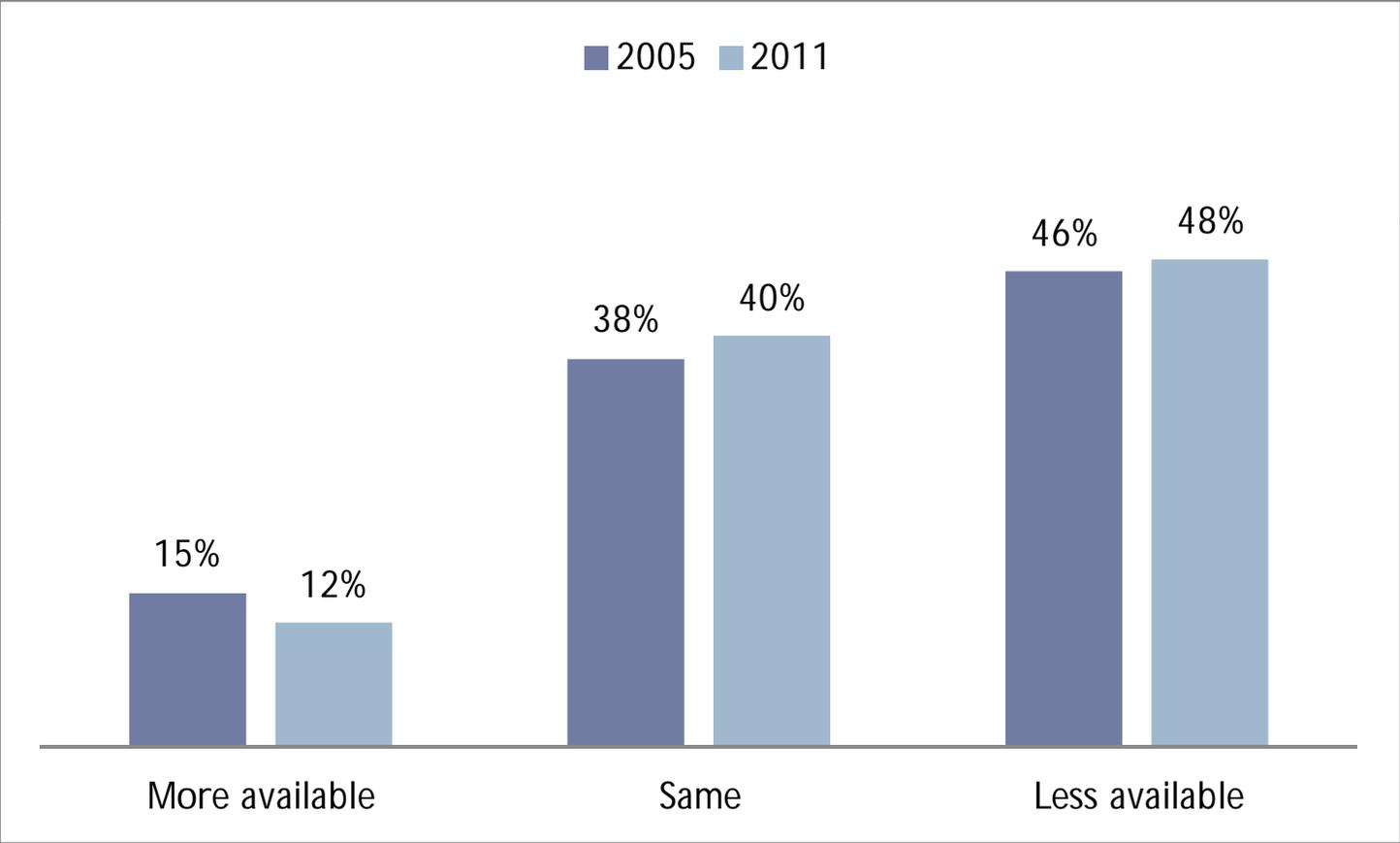
PROBLEM GAMBLING

CONCERN ABOUT THEIR OWN GAMBLING

REASONS FOR GAMBLING

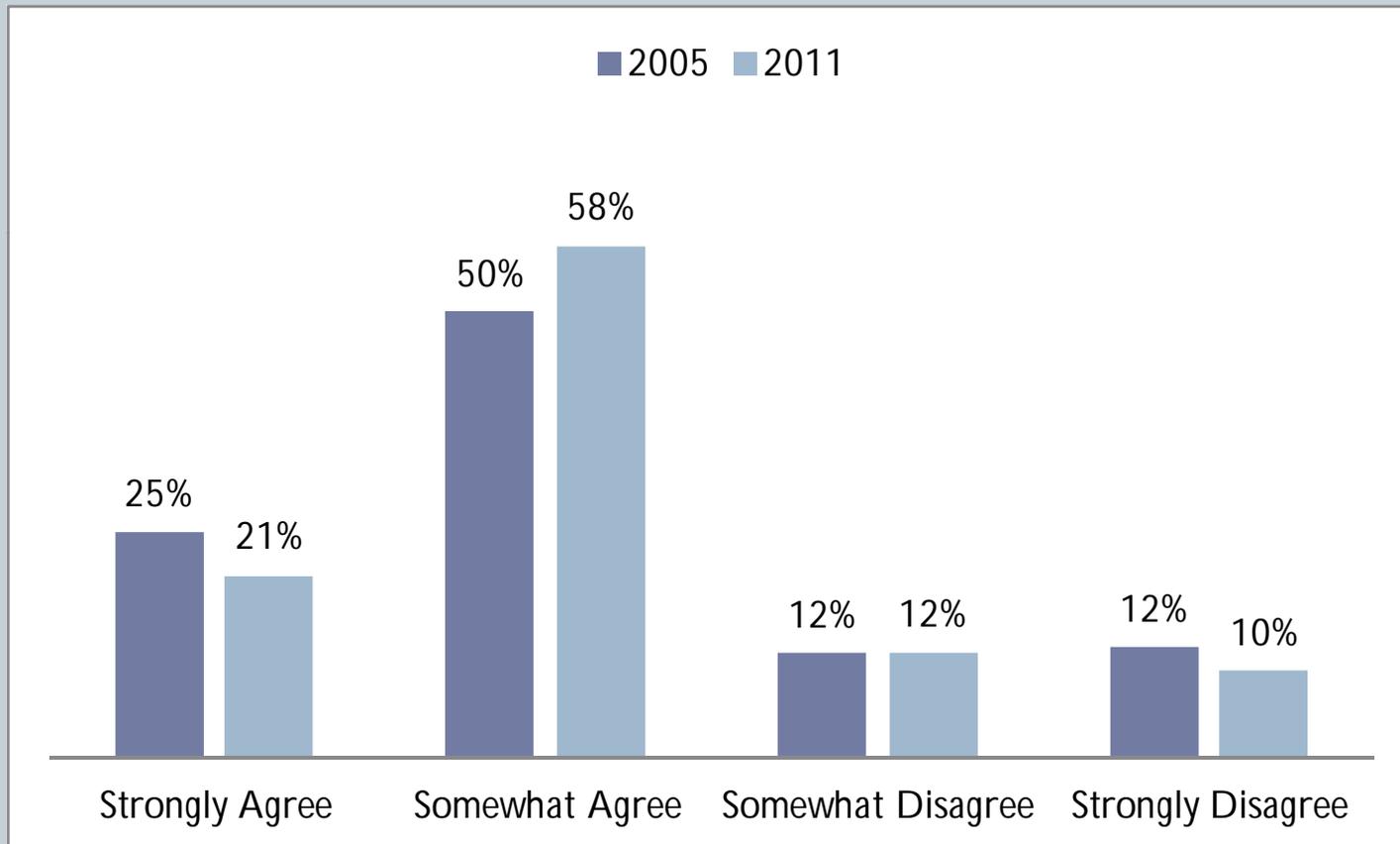
Should gambling be more or less available than it currently is?

27



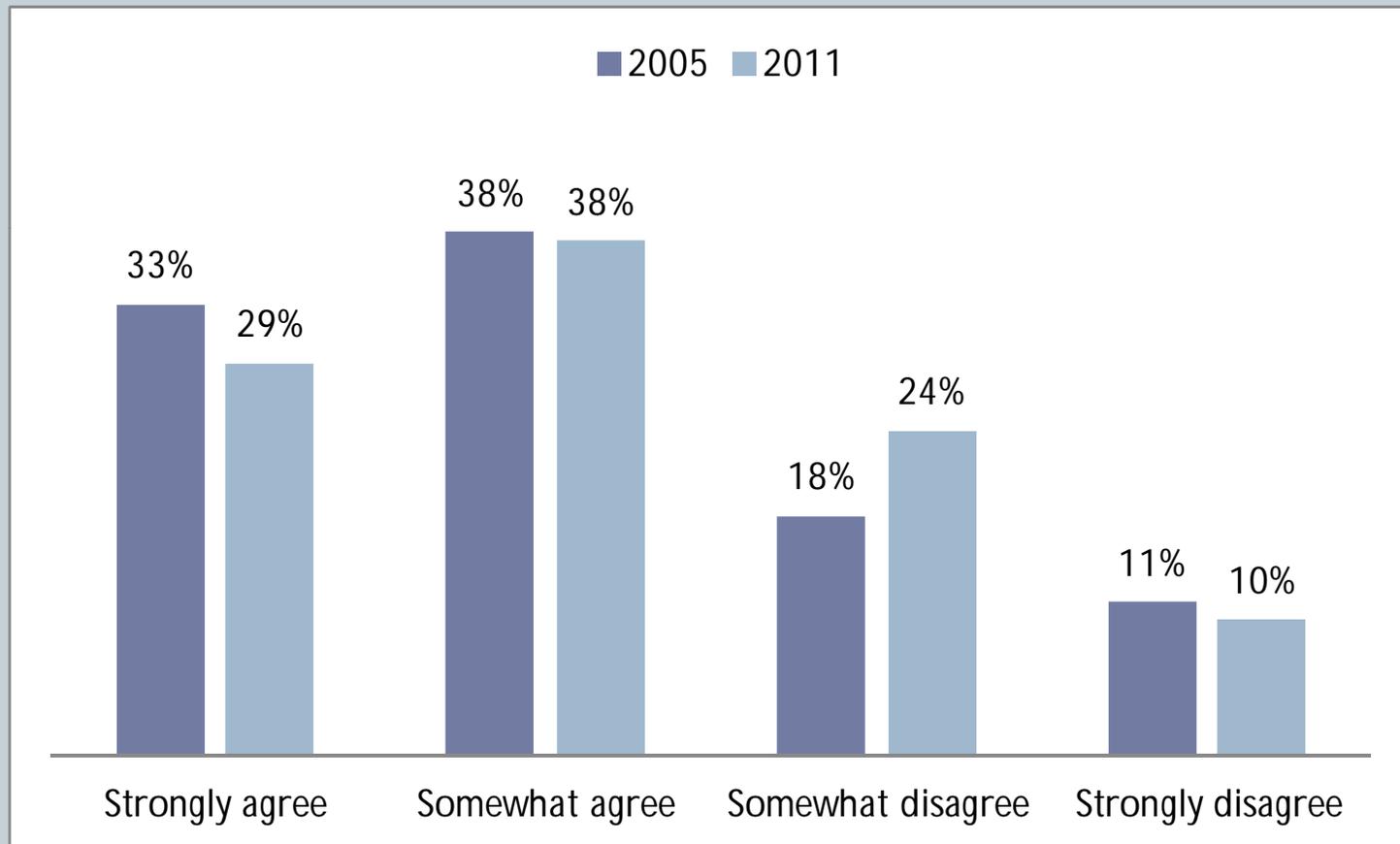
How much do you agree or disagree that gambling activities that support charities and non-profit organizations are a good idea?

28



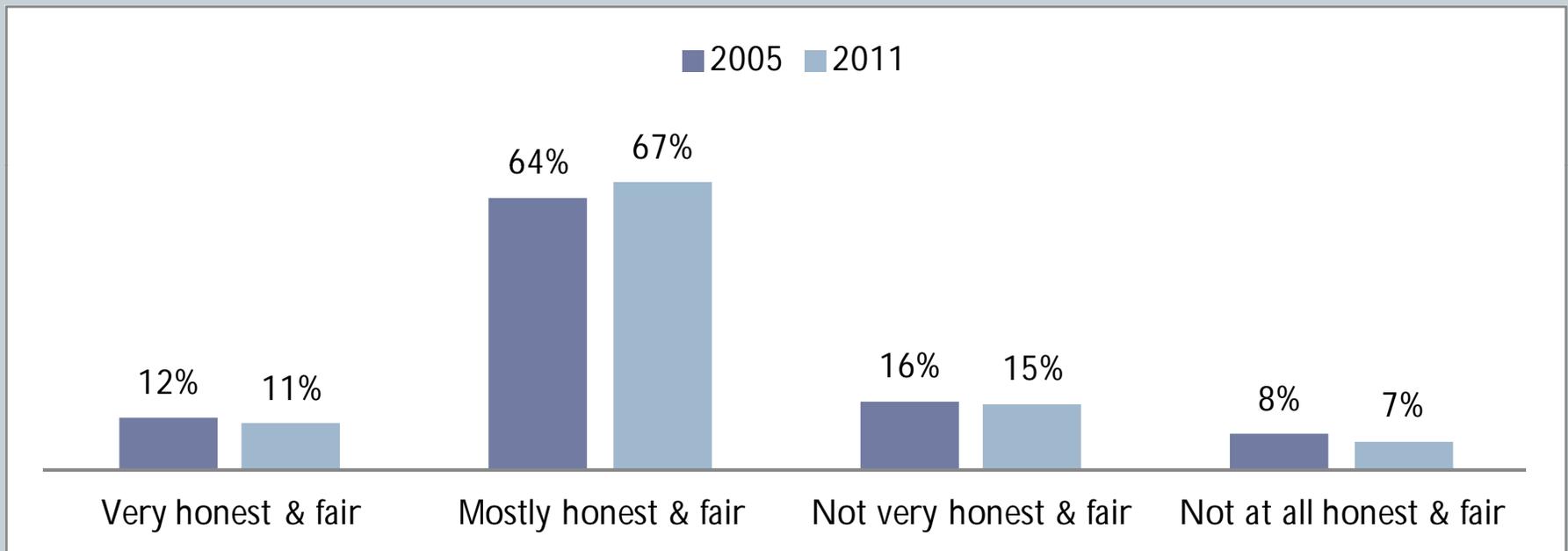
How much do you agree or disagree that laws regulating gambling should be strengthened?

29



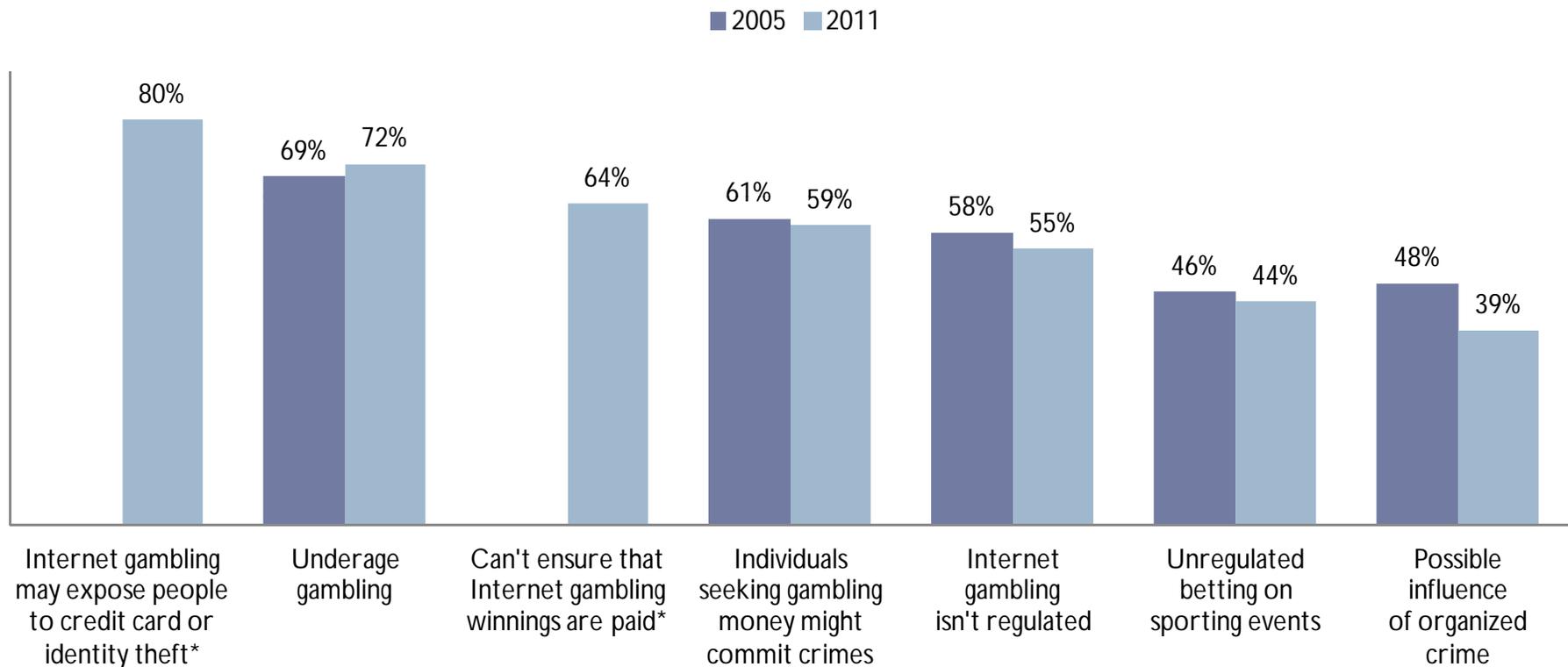
To what degree do you think gambling in Washington State is honest and fair?

30



Percentage Somewhat or Very Concerned about Each Gambling Issue

31



* Question was new in 2011

Problem Gambling

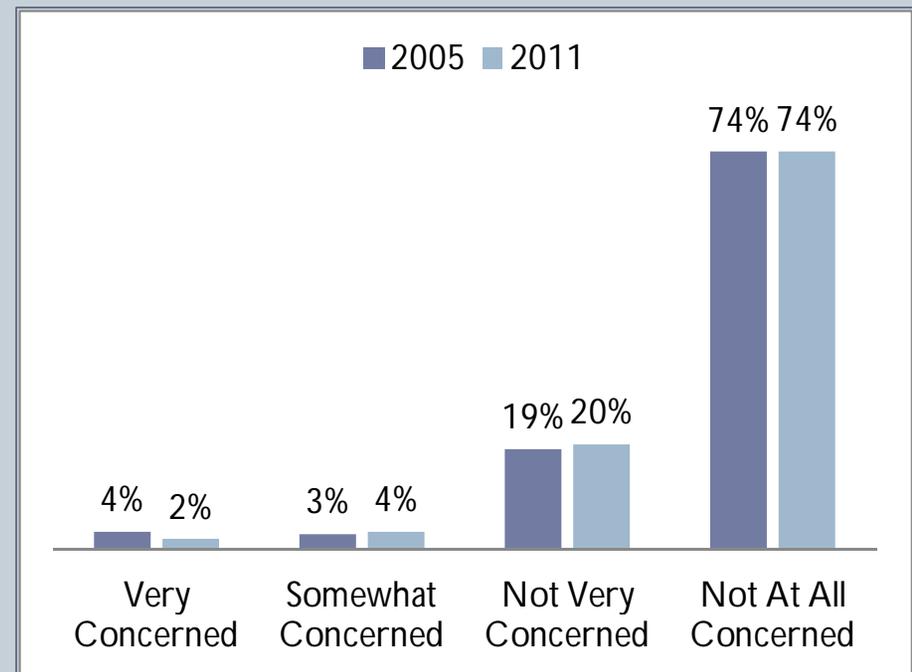
32

- **28% know someone with a gambling problem**
 - Of those, 22% thought the person had committed a crime because of their gambling
- **92% know that gambling treatment programs exist**
- **New survey questions in 2011**

Concern about Their Own Money or Time Spent Gambling

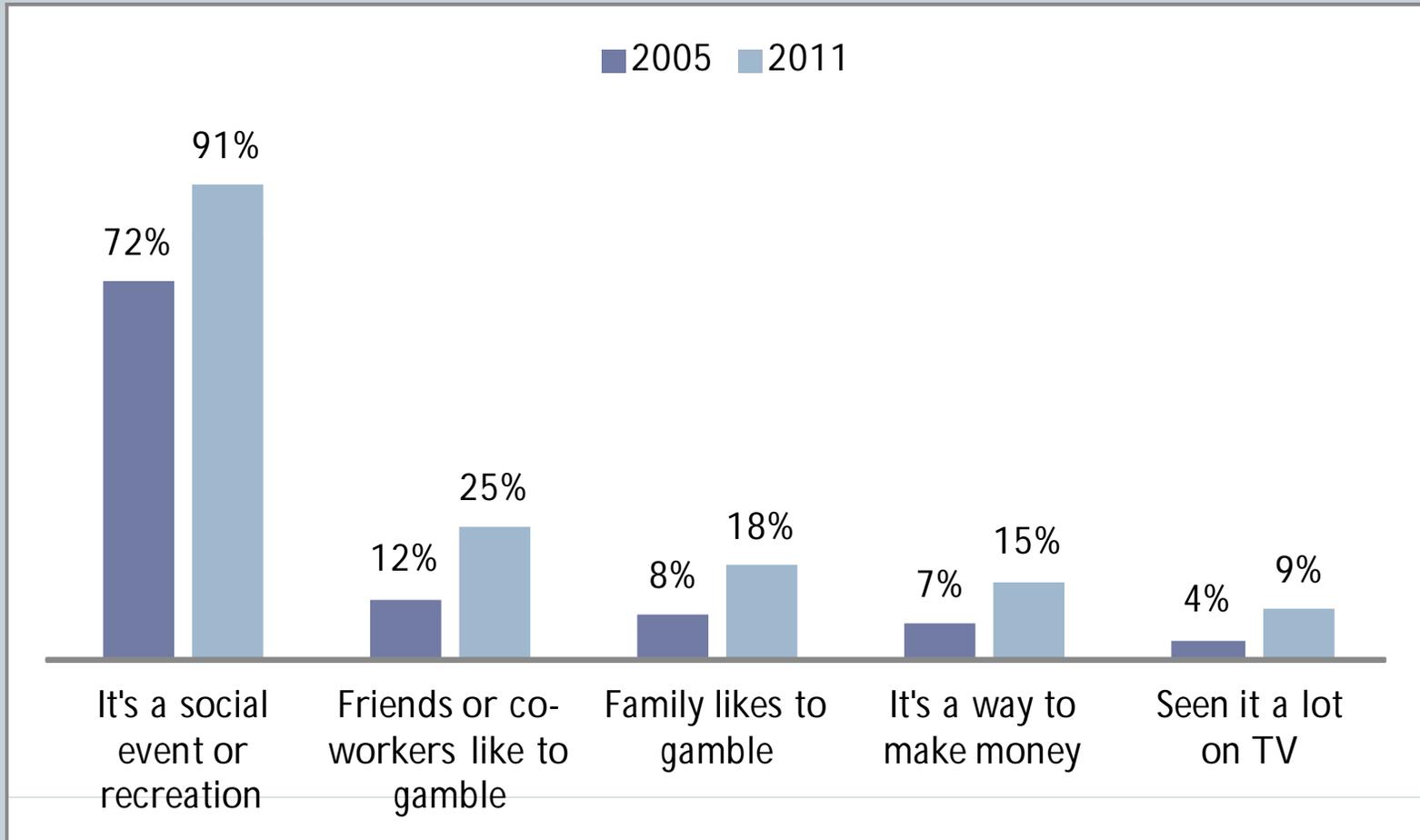
33

- Three-quarters = not at all concerned
- More likely to be concerned...
 - Minority respondents
 - Earn less than \$50,000/yr
 - Not in the labor force
 - Live alone



Reasons for Gambling

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Conclusions

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Gambling Activities

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- **Gambling is a common experience**
 - 91% ever, 64% last year
- **Participation declined from 2005 to 2011**
- **Most likely to gamble last year:**
 - Higher income, in labor force, 2-year or 4-year degrees
- **Top 3 most common activities (2005 & 2011):**
 - Lottery, tribal casinos, raffles

Knowledge of Gambling Regulations

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- **Are gambling activities regulated?**
 - Most correctly answered at least one question
 - Few correctly answered all five
 - Slight decline in percentage answering correctly, 2005 to 2011
- **Who regulates gambling activities?**
 - Few able to name the regulatory bodies

Residents' Policy Opinions

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- **Most residents believe...**
 - Gambling should *not* be more available.
 - Laws should be strengthened.
 - Gambling that supports charities is a good idea.
 - Gambling in Washington is fair and honest.
- **Similar to 2005 results**

Residents' Concerns

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- **Top 3 concerns:**
 - Internet gambling may expose people to theft
 - Underage gambling
 - No way to ensure internet gambling winnings are paid
- **Most likely to be concerned:**
 - Females, minority, over age 65

Problem Gambling

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- **26% have some level of concern about their *own* gambling**
 - 6% somewhat or very concerned, 20% “not very concerned”
 - Most likely to be concerned: lower income, out of labor force, minority, live alone
 - Similar to 2005
- **28% know someone with a gambling problem**
 - Among them, 22% think the person committed a crime
- **Existence of treatment programs is widely known**

Questions?

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